Determining what to measure within an organization can be a very difficult task in the face of changing strategic objectives, differing goals, budgeting constraints and changing industry standards. To ensure that your Performance Management initiative stays up-to-date and focused on the current direction of your organization, measure evaluations must take place on a consistent basis. Efficient and effective measures will guide your organization to future success.

To help you through this process, Actuate can provide your organization with a series of facilitated hands-on sessions designed to ensure that your Performance Management initiative is properly assessed and modified. With over fifteen years of Performance Management expertise, Actuate’s Professional Services Team will guide you through our process, to help ensure you are achieving internal requirements and targets, while simultaneously meeting the expectations of all internal and external stakeholders.
What This Package Will Give You

The Actuate Measure Evaluation Package is most appropriate for organizations needing assistance in evaluating their metrics. Determining the efficiency and effectiveness of a measure is an important task in ensuring an organization stays focused on their long term goals. Our experts will guide you through a review and evaluation and will make recommendations on how to successfully develop your scorecard.

During our time together, we will work with you to accomplish all of your Performance Management objectives relating to measure evaluation. The process will successfully deliver:

• An overview of the benefits of evaluating measures
• Definitions of effective and efficient measurements
• Comprehensive review of all existing measures
• Identification of gaps in your measurement system
• Written summary of findings and recommendations on best practices

Getting Started

To ensure your company’s success in evaluating measures for performance management, an Actuate Professional Services manager will contact you for details regarding your efforts to date to evaluate measures within your organization and what challenges you are facing. The information the Project Manager will need to collect includes the following items:

• Project Objectives: Overall objectives, goals, delivery objectives, timeframe, and critical success factors.
• Project Resources: Any resources that will be involved in the engagement such as Management, Business Analysts, System Administrators, etc.

When the engagement begins, we ask that you ensure that necessary personnel are available, including key stakeholders and Views users, and that your team members be prepared to describe your overall business objectives and performance management requirements. We also require that all necessary hardware, software, and infrastructure are in place, as well as workspace and appropriate facilities for the Actuate consultants working on site.

Typical Agenda

STAGE 1: PREPARATION & PLANNING (1 day on-site)

Upon purchase of this package, the Professional Services Manager assigned to your account will meet with you to:

• Review Actuate’s measure evaluation approach
• Discuss the perceived opportunities for optimizing your existing scorecard
• Discuss roles and responsibilities of key individuals required to make this package successful
• Customize worksheets for use in Measure Evaluation discussion

STAGE 2: MEASURE EVALUATION (4 days on-site)

During this meeting, our Professional Services Manager will facilitate a team discussion with key scorecard / measure owners. This will include:

• Rating metrics to evaluate their effectiveness in achieving organizational goals
• Auditing your existing scorecard to determine which scorecard areas (i.e. strategies/perspectives/goals/objectives) do not have adequate measurements
• Determining measures to be eliminated
• A summary of the measurement gaps of your current scorecard

STAGE 3: FEEDBACK & NEXT STEPS (1 day off-site)

Our Professional Services Manager will provide a written summary of the team assessment, which includes:

• A summary of the evaluation findings
• Proposal for additional measures to fill scorecard gaps
• Suggested next steps for implementing the changes
Building On Your Initial Success

The Actuate Professional Services consultants assigned to your engagement are committed to your success in evaluating the effectiveness of your performance metrics in your organization. Once the implementation has successfully been completed, follow-on Actuate Professional Services can be arranged to help you implement or extend your company’s performance management solution in a variety of areas, including:

- Discussion of best practices in performance management
- Views administration support to help align measures to objectives
- Target setting for your performance metrics
- Techniques for effectively using Views in meetings
- Building enticing interpretive tools within Views
- Dynamic report design and development support
- Spreadsheet-based reporting